



# MERCHANT TAYLORS' OXFORDSHIRE ACADEMY TRUST

## CHARGING AND REMISSIONS POLICY

Version 1.0

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This is a trust-wide policy and not every section will be equally relevant to individual settings.

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## 1. Introduction and Objectives

Under the charging provisions of the Education Act 1996, governing boards of maintained schools and academies must draw up a statement of their charging and remissions policy before they may charge for certain defined activities. Legislation also requires that the policy must be available online. This policy for the Merchant Taylors' Oxfordshire Academy Trust can be accessed from the trust and individual academy websites.

Education legislation demands that schools, subject to certain exceptions, may not charge for education provided during school hours. However, schools are permitted to charge for certain other items and experiences provided to the students. Schools may also invite voluntary contributions to help support these provisions. Schools have a duty to inform parents on low incomes and in receipt of certain benefits that support is available towards certain costs when they are being asked to make contributions e.g. towards school visits.

The trust board of Merchant Taylors' Oxfordshire Academy Trust has set up this policy for certain activities which take place in the school. The purpose of this policy is to clarify which items and experiences that the school provides may have a levy charged upon them, how much of the cost the school expects parents to be charged and who will be offered support to pay for items and experiences for their children. This charging and remissions policy is implemented within the letter of the law, and also embracing the spirit of it. It will be no less generous than the local authority's (LA's) policy.

## 2. Legal Framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- Education Act 1996
- Children Act 1989
- The Charges for Music Tuition (England) Regulations 2007
- The Education (Prescribed Public Examinations) (England) Regulations 2010
- Freedom of Information Act 2000
- DfE (2018) 'Charging for school activities'
- DfE (2020) 'Governance handbook'
- MTOAT Funding Agreement
- ESFA (2024) 'Academy trust handbook 2024' (ATH)

This policy operates in conjunction with the following trust policies:

- MTOAT Complaints Policy
- MTOAT Financial Procedures Manual

### 3. Charging for Education

The schools in the trust will not charge for: -

- Admission applications.
- Education provided during school hours, including the supply of any materials, books, instruments or other equipment.
- Education provided outside school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the student is being prepared for by the school, or part of RE.
- Instrumental or vocal tuition, for students learning individually or in groups, unless provided at the request of the student's parent.
- Entry for a prescribed public examination, if the student has been prepared for it at the school.
- Examination resits, if the student is being prepared for the resits at the school.

The schools may charge for:

- Materials, books, instruments or equipment, where the child's parent wishes their child to own them.
- Optional extras.
- Music tuition (in certain circumstances).
- Certain early years provision.
- The use of community facilities and other commercial activities.
- Provision of information within the scope of freedom of information.

### 4. Optional Extras

A charge will be levied for an activity defined in the Education Act 1996 as an optional extra. Any charges made cannot exceed the cost of providing the optional extra, divided equally by the number of students participating in the activity.

Prior written agreement will be obtained from the parents of students involved in an optional extra for which a charge is to be made.

There is a range of activities which the trust may wish to arrange as 'optional extras'. The majority of these extras are activities which will have to be self-supporting. Items which can be included in the charge made to parents include:

- A student's travel costs.
- Entrance fees to museums, theatres, etc.
- Insurance costs.
- Any materials, books, instruments or equipment, where the student's parent wishes their child to own them.

- Optional workshops where professional artists are brought in that take place in or out of school hours.
- Extended day services offered to students, such as breakfast clubs, after-school clubs and, for primary schools only, at the headteacher's discretion, supervised homework sessions.
- School meals for students who are not entitled to free school meals.
- Optional workshops that take place in or out of school hours.
- The trust reserves the right to recover part or the whole cost of damage to buildings or equipment which is the result of vandalism or negligence by a student.
- Costs associated with tuition of musical instruments or vocal training, provided the teaching is not an essential part of the national curriculum (e.g. KS2 Instrumental and vocal tuition programme). Schools can charge for vocal or instrumental tuition provided either individually or to groups of students, provided that the tuition is provided at the request of the student's parent. The Charges for Music Tuition (England) Regulations 2007 are applicable:  
[www.legislation.gov.uk/ukxi/2007/2239/contents/made](http://www.legislation.gov.uk/ukxi/2007/2239/contents/made)
- Activities which take place wholly or mainly outside school hours, but which are not provided as part of the syllabus for a prescribed public examination and which are not required in order to fulfil statutory duties relating to the national curriculum or to religious education.

It should be noted that no charge can be made for equipment for use in connection with education provided during academy hours; the Act specifically excludes clothing from this definition. Parents can, therefore, be asked to provide their children with appropriate items such as PE and games kit.

## 5. Public Examinations

Students will be charged for examinations in the following instances:

- The charges made by an examination board where a parent/carer asks for an examination mark to be scrutinised.
- Resits of prescribed public examinations when no further preparation has been provided by the trust.
- The cost of entering a student for a non-prescribed examination (e.g. Associated Board of the Royal Schools of Music examinations).
- Examination entry fee(s) if the student has not been prepared for the examination(s) at the trust.
- Where a student fails, without good reason, to complete the examination requirements for any public examination for which the trust has paid, or is liable to pay a fee, then the fee will be recovered from the parents/carers. This will include situations where the student fails to complete the necessary coursework or fails to sit

the final examination, but excludes justifiable or unavoidable absence, e.g. those supported by a medical certificate.

## 6. Voluntary Contributions

Although schools generally cannot charge for school-time activities, they may still invite parents/carers and others to make voluntary contributions (in cash or in kind) to make school funds go further. All requests to parents for voluntary contributions must make it quite clear that the contributions would be voluntary. Students will not be treated differently whether or not their parents/carers make a contribution. If insufficient contributions are received, the trip or activity may have to be cancelled. If the activity cannot be funded without voluntary contributions, schools will make this clear to parents/carers from the outset.

## 7. Trips, Board and Lodging

The school will not charge for:

- Education provided on any visit that takes place during school hours.
- Education provided on any visit that takes place outside school hours if it is part of the national curriculum, part of a syllabus for a prescribed public examination that the student is being prepared for at the school, or part of RE.
- Supply teachers to cover for teachers accompanying students on visits.

Where a trust activity involves students in nights away from home, the trust will make a charge for board and lodging in ALL cases, whether or not the trip is deemed to have taken place in academy hours. However, the charge will not exceed the actual cost of providing the board and lodging for each student involved.

Where a trip is deemed to have taken place outside academy hours and is not required for the purposes of a prescribed public examination, charges can be levied for travel also, and in such circumstances will take into account the actual cost of the travel.

A residential trip counts as falling within school time if the number of school sessions missed by the students amounts to at least 50% of the number of half days taken up by the activity. Bearing in mind that the school day is divided into two sessions and that each 24-hour period is divided into two half days beginning at noon and at midnight, a trip taking place during term time that begins on Wednesday at 8.30am and finishes on Saturday evening at 9pm would count as eight half days. Of these eight half days, six count as school sessions so this trip would be considered to take place during school-time. On the other hand, a trip starting at 8.30am on Friday and finishing at noon on Sunday would count as five half days of which two would be counted as school sessions. This trip would therefore be considered as taking place outside school time and could be charged for in total, including board and lodging.

For a residential trip that takes place largely during school time, or that is essential to the curriculum provided by the school, no charge will be made for the education element or the cost of travel, but charges will be made for board and lodging.

## 8. Transport

The school will not charge for:

- Transporting registered students to or from the school premises, where the LA has a statutory obligation to provide the transport.
- Transporting registered students to other premises where the governing board or LA has arranged for students to be educated.
- Transporting students to meet an examination requirement when they have been prepared for the examination at the school.
- Transport provided for an educational visit.

In general, the cost of any transport provided by the trust in academy hours for activities not deemed as essential parts of the curriculum, will have to be met from voluntary contributions, otherwise the activity will not go ahead. However, where a student makes use of transport not provided by the trust to travel direct from home to an activity sanctioned, though not provided by, the trust then parents will be expected to meet the costs of such travel. An example of this is travel direct from home to work experience.

## 9. Projects and Materials

Students will be charged for finished materials/products to cover the costs of materials in subjects such as Design Technology, unless they meet the Pupil Premium criteria.

## 10. Financial Support

The trust recognises that education places financial demands on parents and there are some occasions when parents/carers will find it hard to meet these demands. Although funds are very limited the trust aims to support parents/families where possible.

Application for financial support will be considered for:

- Obligation items of school uniform.
- Costs of educational visits that are integral to the curriculum.
- Educational equipment.

Consideration will be given to students whose parents/carers are:

- Eligible for free school meals and Pupil Premium funding.



- In receipt of benefits such as Employment Support Allowance, Disability Living Allowance or Universal Credit.
- Experiencing temporary situations which are causing difficulty.

Priority will be given to parents/carers who have not already been in receipt of financial support from the trust.

## 11. School Trip Refunds

All initial deposits for school trips will be non-refundable. Parents will be informed of this when they are provided with initial information about the trip.

In the event that the school has to cancel a trip due to foreseen circumstances, it will make every effort to refund parental contributions. In the event that a school trip is cancelled by a party other than the school due to unforeseen circumstances, it is at the school's discretion as to whether a refund is given to parents.

In the event that a student or their parents cancel the student's place on a trip, it will be at the school's discretion as to whether a refund is given. The school will take into account the reason for cancellation, whether the school will be reimbursed for the student's place on the trip, and whether the place on the trip can be offered to another student.

In the event that a student cannot attend a trip at the last minute, e.g. due to illness, it will be at the school's discretion as to whether a refund is given. The school will take into account whether the school will be reimbursed for the student's place on the trip and whether the place on the trip can be offered to another student.

In the event that a school trip is postponed due to foreseen or unforeseen circumstances, it will be at the school's discretion as to what happens with the parental contributions for the trip. The school will consider its options, which could include carrying forward the money until the trip takes place, transferring the money to another trip, or refunding parents.

Once trip arrangements have been booked and confirmed, if contributions exceed the total cost of the trip, a refund will be given where the excess is greater than £1 per student.

The school will deal with cancellations and refunds on a case-by-case basis, ensuring that all students and their families are treated equally. Individual activities/providers may impose their own cancellation arrangements, which the school may need to observe.

If a parent wishes to make a complaint about refunds, they will be able to do so via the Complaints Policy.